SHARED SERVICES CENTRES IN THE FINANCIAL SERVICES SECTOR: A STUDY OF KEY DETERMINANTS AND ORGANIZATIONAL ISSUES

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Abstract:

Economies of scale continue to increase for most business processes. Because of the desire for economies of scale, what was previously done internally within an operating unit becomes a service to be provided either by someone else in the larger organization or by a contractor. In a desire to achieve economies of scale, what was under an organization's direct control becomes a service from someone working for someone else. Thus, the management problem of our time is how to capture the benefits of these economies of scale in a way that ensures good customer service. The service provider must be accountable for delivering a defined quality of service for a specific cost. There must be a link between that cost and user satisfaction. This can be done through fee-for-service arrangements that emulate the free market or some other mechanism, but the organization must be able to trade off value for cost. This link must be reflected in agreements between providers and users. These agreements must impose requirements on users as well as suppliers. The service provider needs to be accountable, but so does the user. The provider may be accountable for a price and service quality, but the user needs to be accountable for using the service appropriately. It is important to be able to quantify at least some of what the organization is getting through a shared service. Storytelling is not sufficient. Quantification should involve more than just the direct costs of a service, though this may be the easiest to measure. Quality too matters. Since not everything can be quantified, there may be a need for qualitative measures as well. Managers also need to be prepared to update metrics as they gain experience with the service. Despite the many successful examples in the private sector, not every business process lends itself to a shared service.

Keywords: Economies of Scale, Shared Services, Metrics, and Return on Investment (ROI)

Introduction:

The human resource (HR) function has had a turbulent time over the last few years. In many organizations the pendulum has swung between downsizing and redundancy programs and recruitment and retention difficulties. Organizations have increasingly paid attention to the customer, to the need for quality and cost improvement, to produce new products that stay one step ahead of the competition and so on. There have been new forms of service delivery. This may be a response to a more international operation or to a shift to the business unit as the primary organizational structure in place of the function. There may have been a tendency to decentralize responsibility for activities so that decisions are made closer to the customer or to re-centralize to emphasize the coherence of the organization. At an operational level, more and more work may be completed in short-term project teams and less and less through traditional jobs. The HR function has sought to respond and support this sort of organizational change, at the same time as
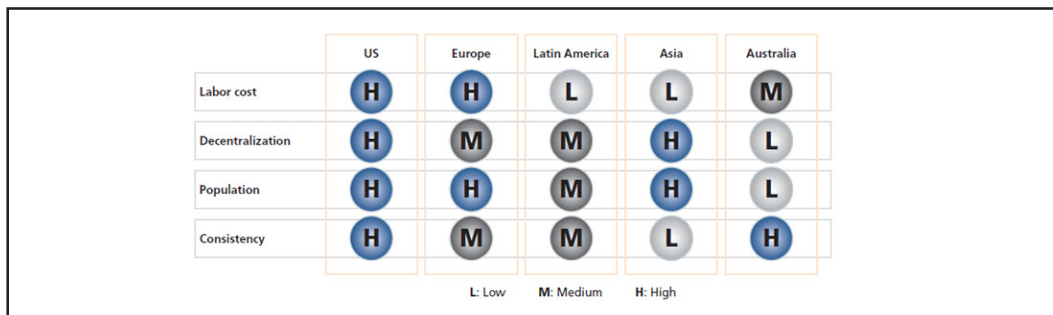
finding its own role and contribution under scrutiny. Consequently, HR has spent considerable time examining itself, its role and its value in the light of its perceptions within the organization. This has led to changes in the way HR delivers its services. More work has been devolved to line managers. Activities previously carried out in-house have been outsourced. The HR function has tried to become more customer friendly, more sensitive to quality and customer satisfaction. This may be reflected in opening hours, speed of response or the way technology has been harnessed. It has meant HR has had to spend more attention on the monitoring and evaluation of its performance.

HR Operations within Shared Services & Support:

The most common general model deployed, this structure featured either an HR operations group embedded within a broader HR services group, or an HR shared services group that functioned as, and was undistinguished from, an HR operations group. Firms that operate with this structure consider their HR shared services group the main entity accountable for driving HR operational efficiency. The official title for this sub-function varies from firm to firm, although typical titles include "HR shared services," "HR operations" or "HR operations, shared services and support." In this structure, survey and interview results suggest that firms either make the entire sub-function accountable for operational initiatives (as described in the "initiatives" section of the report) or a small, separate group existing within the sub-function performs such initiatives and duties. Many firms claim that this model is most efficient because HR operations duties and imperatives are closely linked to HR shared services processes, goals and initiatives.

Figure-1: Original shared services assessment framework

	US	Europe	Latin America	Asia	Australia
Labor cost	H	H	L	L	M
Decentralization	H	M	M	H	L
Population	H	H	M	H	L
Consistency	H	M	M	L	H

L: Low   M: Medium   H: High

Background of the Study:

The study's objective was to investigate the current situation as well as trends for SSCs in the financial services industry – particularly in the present turbulent economic environment. Furthermore, we intended to identify innovators as well as best practices for Shared Service Centers (SSCs) and collect lessons learned from early adopters in the FS industry. Finally, we sought to provide the readers of this study with thought leadership and opportunities for further process and cost optimization and service level improvements through the deployment of SSC, e.g. for additional functions and processes. The main questions we addressed in this study were:

- Organizational aspects of introduction and operation of SSCs
- What are the main decision criteria for choosing a location?
- What are the main difficulties to overcome?
- What types of processes are covered by SSCs now and will be c   overed in the future?
- Which processes provide the highest benefit and are these processes already implemented?

- How should SSCs be introduced to realize cost savings?
- What role does innovation play regarding organization of SSCs and their success?

Study Method and Data Collection:

This research was conducted using a "grounded theory" approach. The survey questions were initially created based upon discussions with individuals within the shared services field. A small focus group was then asked to give feedback concerning the survey questions. The focus group consisted of individuals that work in the shared services field. Their comments were incorporated into the survey as appropriate. An extensive list of potential contacts was then identified and compiled. An e-mail was compiled that explained the purpose of the research, included a link to the survey, and requested participation. The e-mail was then sent to over 300 individuals on the contact list. The response rate was slightly higher than 15 per cent, with approximately 46 respondents completing the survey. The survey responses were analyzed, codified, and dissected, and patterns were identified. Particular attention was paid to survey answers that appeared anomalous. After examining the survey responses and identifying five areas of best practices, we developed interview questions pertaining to these areas and conducted follow-up telephone interviews with selected respondents.

The interview questions were designed to delve more deeply into the topics identified as best practices and gain a thorough understanding of the approaches used by the implementation of shared services. So that we could gain insight directly from individuals and organizations involved in a shared services implementation, a survey instrument was developed. An extensive list of potential contacts was then identified and compiled. These contacts were organizations and/or individuals involved in implementing government shared services at public agencies at all levels of governments throughout the world. An e-mail was compiled that explained the purpose of the research, included a link to the survey, and requested participation. The e-mail was then sent to over 300 individuals on the contact list. The response rate was slightly higher than 15 per cent, with 46 respondents completing the survey. In this section, we summarize the findings from the survey.

Results and Discussions:

Organizational Aspects of Shared Services Size, coverage and scope:

Shared services—accepted by the FS (Financial Services) industry? More than 40 per cent of the SSCs have been established for more than 3 years, most of th em as managerial and independent units. Nearly half of SSCs are operating as group-wide centers. This demonstrates that shared services are an accepted organizational and strategic model within the financial services industry.

Figure-2: Coverage and Organizational Scope
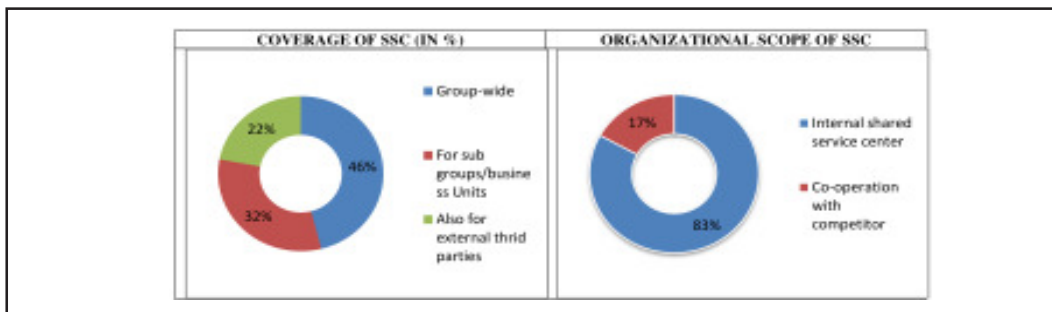
However, the fact that only 28 per cent of the centers employ more than 500 people (Full Time Equivalent-FTEs) across all industry specific and administrative processes shows that the implementation of shared services in the financial sector, compared to other industries, is still at the beginning of the journey of reaching a higher degree of efficiency and integration.

Figure-3: Number of Employees operating the SSC
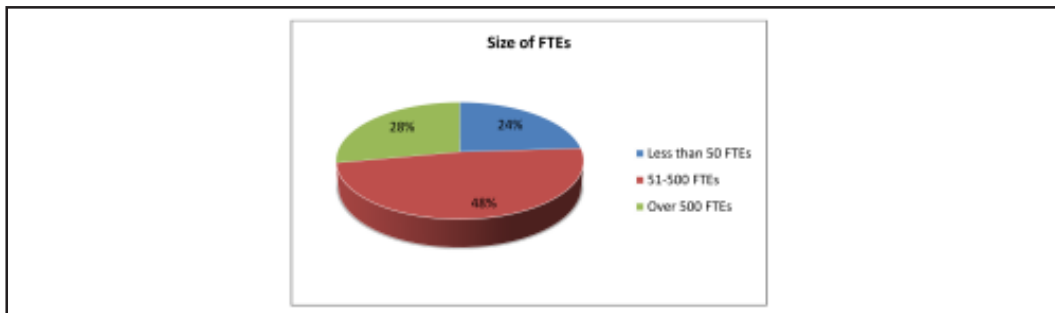
The majority of banks and insurance companies that do operate Shared Service Centers have implemented this strategic option for one or a few processes. But only in very limited cases have SSCs been implemented for all or most potential processes. Furthermore, SSCs are controlled in a rather traditional way by putting SSCs under the leadership of a C level (38 per cent) or a functional leader (31 per cent). This shows that cross business centers or cross functional centers are not very common: A situation that reflects our experience with the existing centers in a relatively low complexity environment compared to the increasing complexity of multi business unit/multi functional shared services. Only 20 per cent of respondents have their SSC managed by a dedicated SSC leader, designated to focus on the continuous professionalism of the service delivery.

Figure-4: Responsibility of management for SSC5 fio5

|	C-level	Functional Leader	Business Unit Leader	SSC leader
Series1	38%	31%	11%	20%
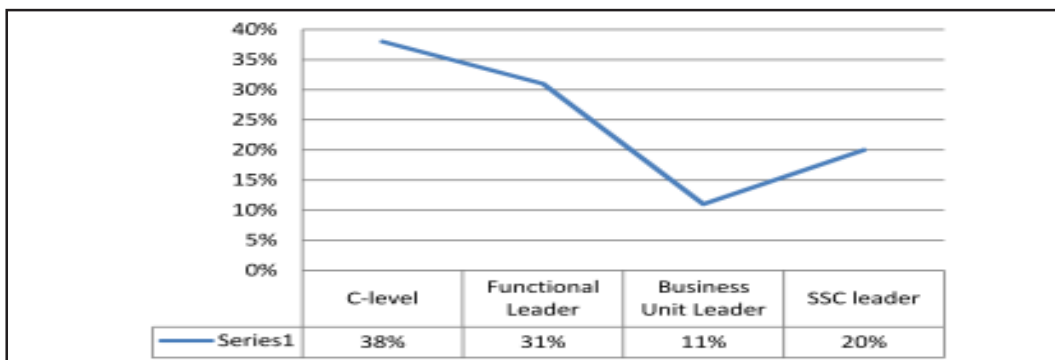
5.2. Managed processes:

The selection of relevant processes for a shared service depends on a variety of criteria e. g. complexity, relevance for the business, connectivity requirements, opportunity of standardization etc. For these reasons, it makes sense to distinguish between core business processes and support processes. 50 per cent of customer care and payment services are or will be performed in a SSC

Those processes with a relatively low complexity and high level of standardization potential are traditionally the most effective ones for shared services. About 50 per cent of customer care and payment services are already or will soon be offered in SSCs followed by custody and claims management. Processes with the highest potential for the future are dunning and collections as well as security transactions, named by nearly 20 per cent. The process with the lowest potential for shared services seems to be credit management. This process is very often seen as highly individual and very language specific. In terms of standardization of credit policies and a harmonized cross-BU handling these processes offer high potential for a multi-lingual SSC even though the complexity of these centers will rise. The high rating of N/A (not applicable) for all processes indicates that the opportunity of using SSC is rather underestimated considering the number of companies that have successfully implemented SSCs for these processes.

Figure-5: FS core processes (realized/planned) in per centage
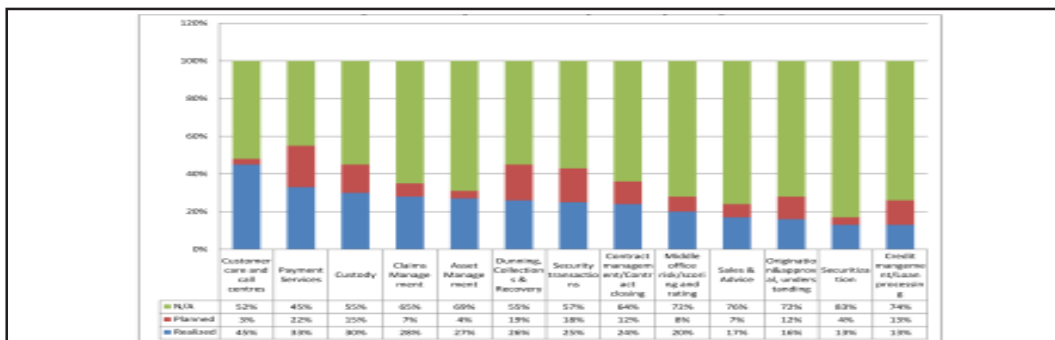
The opportunity to use transactional processes for SSCs is well accepted in the financial services industry as nearly half of the processes (46 per cent) are or will be transaction based. More innovative forms of shared services, so-called "Centers of Expertise", with the opportunity to centralize expert know-how and make it group-wide available are continuously growing.

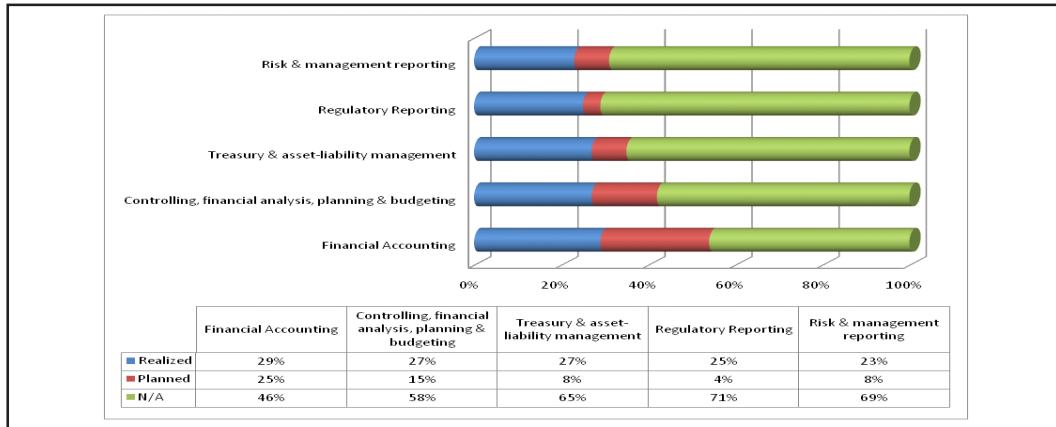**Figure-6: Planned/realized SSCs by category of core business process**
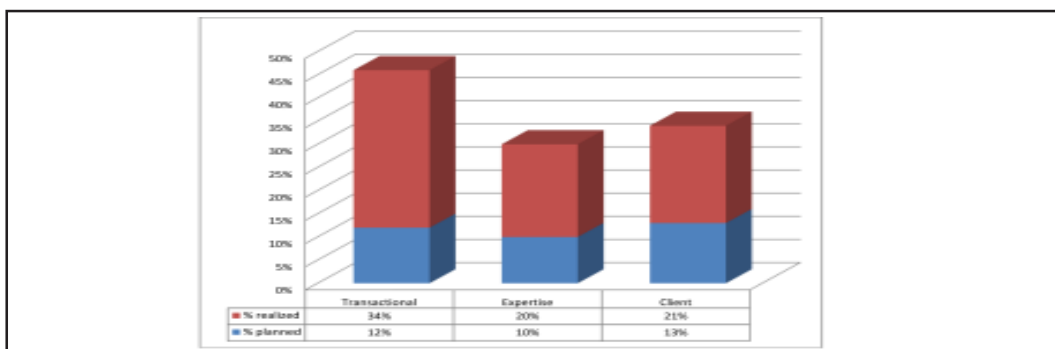
More transactional and support processes are commonly shared Transactional support processes are traditionally he driver of shared services, especially in other industries. Surprisingly some core processes at banks and insurance companies (e.g. customer care, payment services, custody and claims management) seem to be much better

accepted than e.g. financial accounting, even though financial accounting and financial control offer a high potential for shared services compared to other industries. This should change in the future as indicated by the participants of this study to a rather high degree of shared services for IT and human resources.
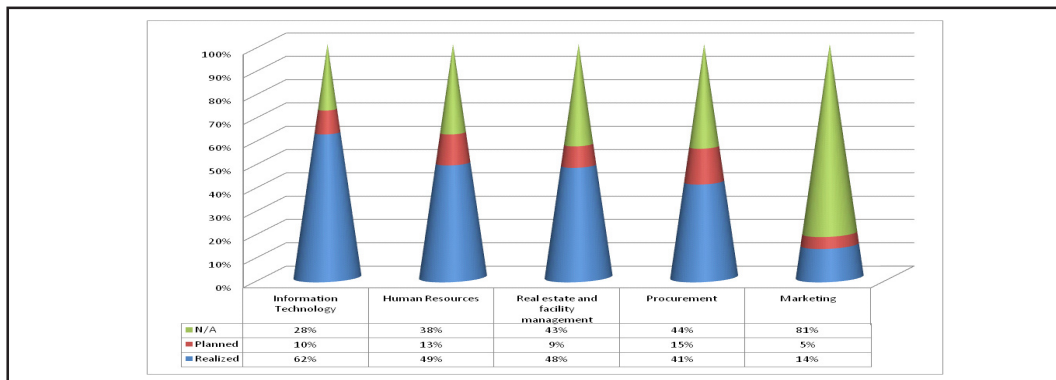
Figure-7: Financial and risk processes (realized/planned)

	Financial Accounting	Controlling, financial analysis, planning & budgeting	Treasury & asset-liability management	Regulatory Reporting	Risk & management reporting
Realized	29%	27%	27%	25%	23%
Planned	25%	15%	8%	4%	8%
N/A	46%	58%	65%	71%	69%

Compared to financial accounting there is a higher degree of managing the other support processes with SSCs and still significant potential has not been realized so far.

**Figure-8: Support processes (realized/planned)**

	Information Technology	Human Resources	Real estate and facility management	Procurement	Marketing
N/A	28%	38%	43%	44%	81%
Planned	10%	13%	9%	15%	5%
Realized	62%	49%	48%	41%	14%

As a conclusion, we see that companies in the financial services industry have so far concentrated on the "low hanging fruit", e.g.on support processes (information technology, human resources, real estate), and there are opportunities to extend the focus of SSCs towards more value added services in the areas of finance, risk and core business processes.

Location aspects: Eastern Europe's relevance for SSC in financial services is rising. Despite the main trend of centralization there is a strong country focus (44 per cent) with rather low complexity driven by different legal, language and cultural requirements. The central bundling of processes seems to stop at national and regional boundaries, with the complexity rising dramatically when crossing frontiers. Only 19 per cent pursue a global orientation with service provision to all units worldwide. The additional savings by operating SSCs globally need to be evaluated in the context of the impact of the rising complexity.

Figure-9: Regional scope of SSC in percentage deemed feasible
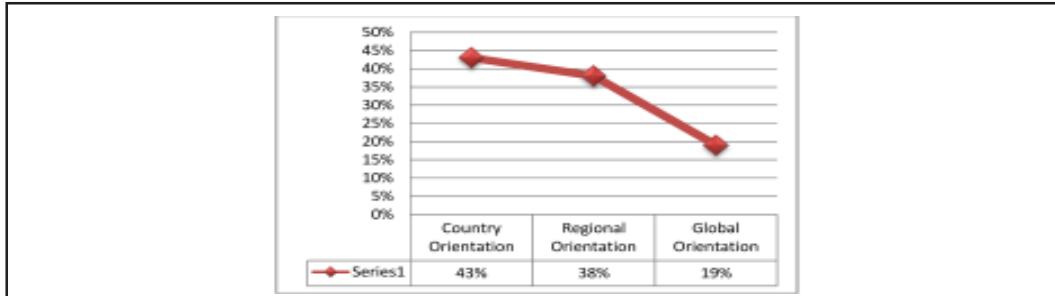
A key question regarding the operation of SSCs is choosing the appropriate location as this is a strategic decision with a long term time frame and requiring substantial investments. The SSCs in the financial services industry are essentially domestic and near shore entities. The development of Eastern Europe countries and in some cases offshore can be seen in the FS industry. The future shift from domestic to near shore locations is following the classic trend. But the offshore market (**Asia including India**) is growing significantly, up to 30 per cent in the future. This also depends on individual process requirements. Our expertise from various projects shows that in some cases three operating models have been established successfully: domestic location for processes with high connectivity to the business, near shore for rather low connectivity requirements and offshore with very high standardization potential.

Figure-10: Comparison of present and future location of SSC
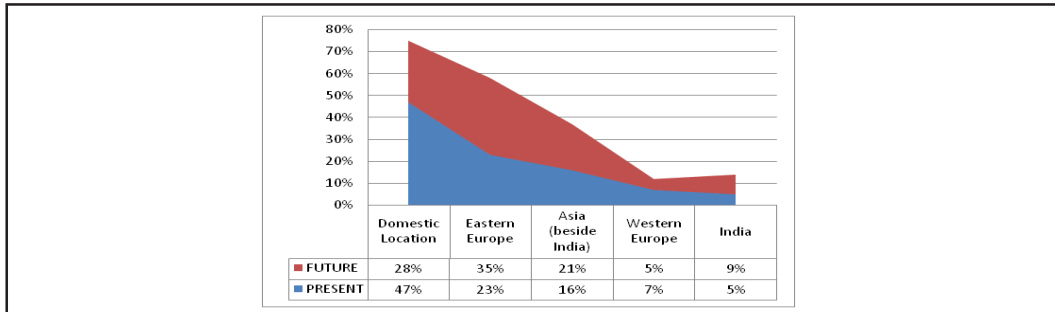
Although some risks exist when transferring business processes to other internal units or even to outsourcing partners especially in financial services (Gewald, et al. 2009), additional issues might depend on the geographic location where services are provided. Qualification as decision critical criteria The empirical results corroborate prior findings and theoretical hypotheses from scientific literature: Personnel qualification and language skills are the most important decision criteria for selecting the optimal location. Major criteria for the "near shore" solution are mainly geographical and infrastructure opportunities and language opportunities but also very often cultural differences with locations outside Europe. These criteria are important drivers of complexity during the set-up as well as the operation of the shared services. The great importance of data and intellectual security and privacy reflects the specific requirements of the financial services industry. Since services rely heavily on the firm's know-how, data and intellectual security.

Figure-11: Importance of criteria for choosing the optimal location in percentage
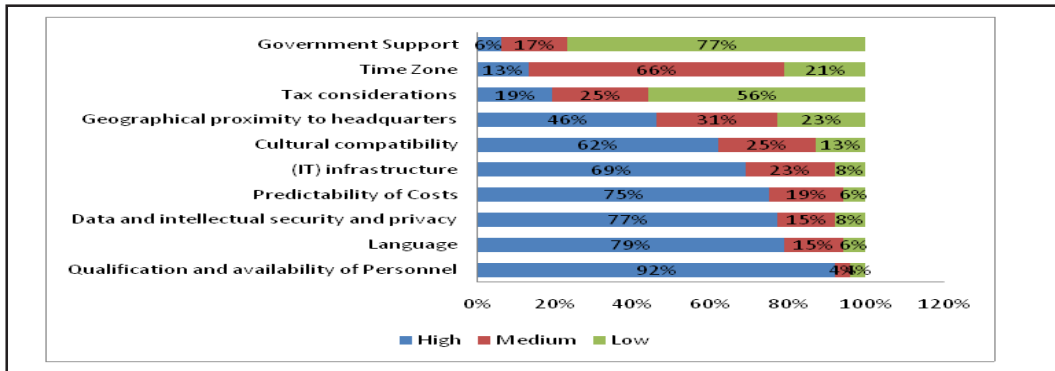
The (IT) infrastructure aspect is often understood as an aspect relevant for manufacturing offshoring, but not for services offshoring. Managerial practice now shows that infrastructure is indeed highly relevant for the location decision. All in all, the ranking of decision criteria are suggested decisions about location are well considered and are not considered to be trivial.

6. Findings of the Study:

Finding 1-The Goal of Most Shared Services Initiatives Is Cost Savings: Table 1 shows that the stated goals of the participants for implementing a shared services model were varied. The most frequent response (21) was cost savings, followed by efficiency and the desire to provide higher quality service. Respondents were allowed to list multiple goals, and several gave "other" responses such as effectiveness and increased collaboration.

Table-1: Goal of Shared Services Initiative

GOAL	No.	%
Cost Savings	21	22
Efficiency	16	16
Provide higher		
Quality service	15	15
Reduce redundancy	14	14
Standardization	8	8
Economies of scale	5	5
Other	18	18
Total Responses	97	

Finding 2-The Majority of Participants Achieved Their Goals: As indicated in Table 2, the vast majority of the participants (34 out of 46) felt that they had achieved their goals in implementing shared services. Nine of the respondents felt that they had only partially achieved their goals (although all of them believed that they were on their way to fully completing the goals).

Table-2: Were the Goals Achieved?

ANSWERS	No.	%
Yes	34	74
Partially	9	20
No	3	6
Total Responses	46	

Finding 3-The Most Common Goal Measurement Was Cost Savings: The most common measurement of achievement of goals was cost savings, followed by increased effectiveness, customer satisfaction, and reaching stated goals, as reported in Table 3.

Table-3: How Goals Were Measured?

MEASUREMENT	No.	%
Cost Savings	15	31
Increased effectiveness	9	18
Customer Satisfaction	8	16
Reaching stated goals	8	16
Increased Efficiency	7	14
Other	2	4
Total Responses	49	

Finding 4-The Most Positive Result of Implementing Shared Services Was Improved

Service: Table 4 lists what the respondents thought were the most positive results of implementing shared services. The responses, while fragmented, most often listed improved service and increased collaboration as the greatest positive results.

Table-4: Most Positive Result of Implementing Shared Services

RESULT	No.	%
Improved service	10	19
Increased collaboration	7	13
Standardized services	6	11
Increased Efficiency	4	7
Increased focus	4	7
Cost savings	4	7
Consolidation of services	3	6
Increased awareness	3	6
Increased constituent support	3	6
Other	10	19
Total Responses	54	

Finding 5-The Most Negative Result of Implementing Shared Services Was "People Issues": Conversely, the most commonly cited negative result (as shown in Table 5) was people issues. People issues included things such as lack of change management, political turf wars, and job losses.

Table-5: Most Negative Result of Implementing Shared Services

NEGATIVE RESULT	No.	%
People issues	23	43
None	9	17
Mistakes in implementation	7	13
Increased confusion	5	9
Other	10	19
Total Responses	54	

Finding 6-Shared Services Was Most Often Initiated By Leaders Within the Agency: Table 6 indicates the reasons reported for undertaking a shared services implementation. The majority of respondents reported that leaders within their organization had initiated shared services, with a large number stating that it was a committee within the agency or a mandate from a higher agency.

Table-6: Who Initiated the Shared Services Implementation in Your Organization

WHO INITIATED?	No.	%
Leaders from within agency	19	40
Committee/group within agency	15	32
Policy mandate from higher agency	13	28
Total Responses	47	

Finding 7-The Impetus to Undertake Shared Services Was Most Often Cost or Service Variables: The largest number of survey respondents reported that it was cost or service variables that provided the impetus to undertake the project, followed by a mandate from a higher agency.

Table-7: What Was the Impetus to Begin the Shared Services Implementation

Impetus to Begin	No.	%
Mandated by cost or service variables	17	39
Mandated by higher agency	12	27
Leaders in agency pushed it	6	14
Public prompting	4	9
Other	5	11
Total Responses	44	

Finding 8-The Most Significant Lesson Learned from Implementing Shared Services Was That "Change Management Is Key": Table 8 demonstrates that the list of significant lessons learned by survey participants is quite fragmented. The most frequently cited lesson learned was that "change management is key." Many of the participants also answered that "communication is key," "management support is key," and "stakeholder support is key."

Table-8: Most Significant Lessons Learned

Lesson Learned	No.	%
Change management is key	17	24
Communication is key	11	16
Management support is key	11	16
Stakeholder support is key	9	13
Need good governance/ planning	6	9
Other	16	23
Total Responses	70	

Finding 9-The Biggest Mistake Made in Implementing Shared Services Was Insufficient Change Management: Table 9 (see page 20) presents the biggest mistakes made by the respondents in implementing a shared services model. Many respondents (12) felt that their biggest mistake was not having sufficient change management.

Table-9: The Biggest Mistakes That My Organization Made

Biggest Mistake	No.	%
Insufficient change management	12	25
Poor Project management	7	15
No mistakes	6	13
Lack of resources	5	10
Insufficient communication	5	10
Poor planning	4	8
Other	9	19
Total Responses		48

Finding 10-The Thing Most Organizations Did Well Was Project Management: The participants were divided as to the answer most frequently given for the things that their organization did particularly well (Table 10). Project management and collaboration were the answers most often given. When combined these two answers represented 59 per cent of the responses.

Table 10: Things My Organization Did Well

Things Done Well	No.	%
Project management	13	28
Collaboration	11	23
Change/People management	5	11
Planning	4	9
Good Project execution	4	9
Standardization	4	9
Other	6	13
Total Responses	47	

7. Summing Up: Companies in the financial and public services industry have already implemented SSCs for their support and transactional processes. However, in the first step the industries are focused on the "low hanging fruit". The next steps will be to improve the existing services, to increase client satisfaction, to include further processes and develop new services that offer added value to the clients.

Figure-12: The potential benefits of the HR shared services journey.
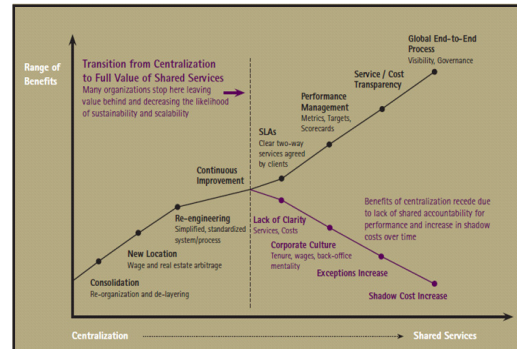
(Source-Accenture news letter)

Increased pressure on quality and risk management over pure cost reduction SSCs provide sustainable cost savings in the long term. As location decisions result in considerable investments it will not be possible to realize ongoing cost savings through repeatedly moving from one location to another. Cost savings based on labor cost arbitrage due to lower salaries in near-shore or offshore locations will be more and more difficult to realize. Limitations will not only be infrastructure, language requirements and availability of skilled resources but also, for example, data and intellectual security and privacy. Therefore, it will be more and more important to realize further optimization potential in process automation and standardization. Organizational alternatives, e.g. as Centers of Expertise or outsourcing of transactional activities or combinations of SSC and outsourcing will gain more importance in the future. Additional processes performed by a Shared Service Centre organization will enlarge the offered services and added value to the internal customer. As one attribute of SSCs is the introduction of market conditions for internal services, the role of the former "colleague" has changed more and more to an internal customer who pays for the service. Therefore, quality, risk management concepts and service level management will gain greater importance to ensure the continuous operation of the SSC. Organizational models such as a shared service have just been accepted in the

financial services industry and will be widely adopted in the future as it delivers significant cost savings and enhanced process quality in FS and Public services core and support processes.

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Appendix Questionnaire

Background Information:

Please answer the following questions as best as possible.

Name: _____

· Title: _____

· Organization: _____

· Email: _____

· Phone #: _____

May we call you to discuss your answers?

· ___ No, Do not call ___ Yes, Call anytime ___ Yes, Call mornings only

· ___ Yes, Call afternoons only ___ Yes, Call after hours

Month/Year that Shared Services Implementation Began (MMYYYY): _____

Month/Year that Shared Services Implementation Completed (MMYYYY): _____

Services Shared:

· ___Accounting ___ Human Resources ___ Information Technology ___ Payroll ___ Purchasing

Is it OK to list your name and agency in the "acknowledgements" section of the final report?

___ Yes, you may list my name as a contributor
___ No, I prefer to remain anonymous

Would you like a copy of the final report when this research has been completed?
· ___ Yes ___ No

Questions on Goals:
1. What was the goal of your shared services implementation?
2. Has that goal been achieved? Please explain.
3. How did you measure if you achieved the goal(s)?
4. What is the most positive result of the shared service initiative?
5. What is the most negative result and how could it have been avoided?
6. Who pushed this strategic initiative within the organization? Whose idea was it?
7. How did you know when you were ready to undertake your Shared Services project? What was the impetus?

Questions on the Implementation Process:
What were the most significant "lessons learned" from your shared services implementation?

What were the biggest mistakes that your organization made and what would you do differently?

What were the things that your organization did especially well?

Were your greatest challenges (choose one):
___ People Oriented ___ Technology Oriented
___ Process Oriented
                Please explain these challenges.

What steps did you take to overcome the people, technology, and process challenges?
How did you become involved in the initiative?
From within your organization who were the key people in implementing your shared services initiative and why?
From outside your organization (i.e., vendors, consultants, etc.) who were the key people in implementing your shared services initiative? What role did they play both during and after the implementation?
Is there a preferred order of implementation (i.e., should certain tasks or jobs get implemented first, second, etc.) or does it all happen at once?

Advice for other Public Agencies Implementing A Shared Services Program:

What services would you recommend as most ideal to share?

___ Accounting ___ Human Resources ___ Information Technology ___ Payroll ___ Purchasing

What advice would you give to someone just starting a public shared services implementation?
If you were asked to provide a list of "best practices," what would be on the list?
Are there any other comments that you would like to make (about this research or anything else)?
The administrators of this survey are looking for more people for this research. Please provide contact information of other people that you know who have participated in implementing shared services in a public agency and who might be interested in completing this survey.